



Helping you get the most from your benefit plan

The Small Group Benefit Experts - for groups of two or more

4551 W. 107th Suite 100
Overland Park, KS 66207
800.825.7531

Employer Benefit Adviser

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What to Know This Month

Here's a sneak peek at the highlights in this issue:

1. Boost Your Savings with the Premium Only Plan
2. Allied to Provide 5500 Filing Worksheet for 2025 Reporting
3. Holiday Hours

Boost Your Savings with the Premium Only Plan (POP)

The Premium Only Plan (POP) is a fantastic opportunity for you and your employees to enjoy significant tax benefits. By offering this tax-favored option, you can reduce your payroll taxes while providing your covered employees with the ability to save 15-40% on premium contributions using pre-tax dollars under IRS Section 125.



How It Works:

1. **Tax Documents:** Allied provides you with necessary tax documents (small fee may apply).
2. **Pre-Tax Deductions:** Have employees sign a pre-tax document, reducing taxable income.
3. **Lower Payroll Taxes:** Reducing your pre-tax income means lower Social Security and Medicare taxes, and possibly state taxes.

We encourage you and your employees to take advantage of the POP plan today to maximize savings!

[Premium Only Plan](#)

Allied to Provide 5500 Filing Worksheet for 2025 Reporting

Allied National will soon mail you a 5500 Filing Information Worksheet to assist with your upcoming federal filing requirements. Please review the important details below to ensure timely compliance.



Form 5500 Filing

- **What it is:** Reports your plan's financials and operations to the IRS.
- **Deadline: July 31, 2025** (for calendar-year plans).
- **Who must file:**
 - Small employers (under 100 employees) are generally exempt **if** the plan is fully insured or unfunded.
 - If your plan is **self-funded** (e.g., using a Third-Party Administrator), you must file.
- **How to file:** Most small employers can use the 5500-SF (short form). Allied provides the necessary data, but you are responsible for filing.
- **Support:** Filing instructions and resources are available on the Allied Self-Service Site.

PCORI Fee

- **Purpose:** Funds health research through the Patient-Centered Outcomes Research Institute (PCORI).
- **Deadline: July 31, 2025**, via IRS Form 720.
- **Fee amounts:**
 - **\$3.47 per covered person** for plan years ending Oct. 1, 2024 – Sept. 30, 2025.
 - **\$3.22 per covered person** for plan years ending Oct. 1, 2023 – Sept. 30, 2024.

To assist with both of these filings, we have a page on our website. Please refer to this page for detailed instructions on how to complete a 5500-SF filing or to learn more about PCORI.

[Guidance for Form 5500 & PCORI Web Page](#)



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Allied National | 4551 W 107th St Suite 100 | Overland Park, KS 66207 US

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